How Do I Create a Requisition?

This instruction provides Requisition Preparers with an introduction to the PeopleSoft eProcurement 8 system. Requisitions will be entered as shown below and later assigned to Purchase Orders by buyers.

Login

1. Assemble all the documentation for the requisition.
2. 1. Login to the PeopleSoft ver. 8 eProcurement system and prepare to create a requisition

Navigation

3. Follow the 2. Navigation into ePro8.

Create a Requisition

4. Select Create 3. Requisitions from the panel selections available.
5. Within the Create Requisitions, you will be able to create requisitions by browsing or searching company and external catalogs & cancel requisitions.
6. You will need to select the Business Unit "LBNL", and as the "Preparer" you will have to enter the 4. Requester's name.

7. Add the 5. Defaults to the requisition, enter the 6. Requisition Type, and if Applicable, enter the Requisition Title

Requisition Line Information

8. Add the 7. details for each item being requested for purchase.
9. If you have more than one item on the requisition, click the "Special Request" button.
10. Restricted Items must conform to the 8. LBNL policies.
11. Once complete you can either 9. Save for Later or Save and Submit.

Sole Source, Comments and Attachments

12. Should you need to create a 10. Sole Source requisition.
13. Click on the Comments icon to add 11. Attachments.
13. After you've uploaded your file you are complete.

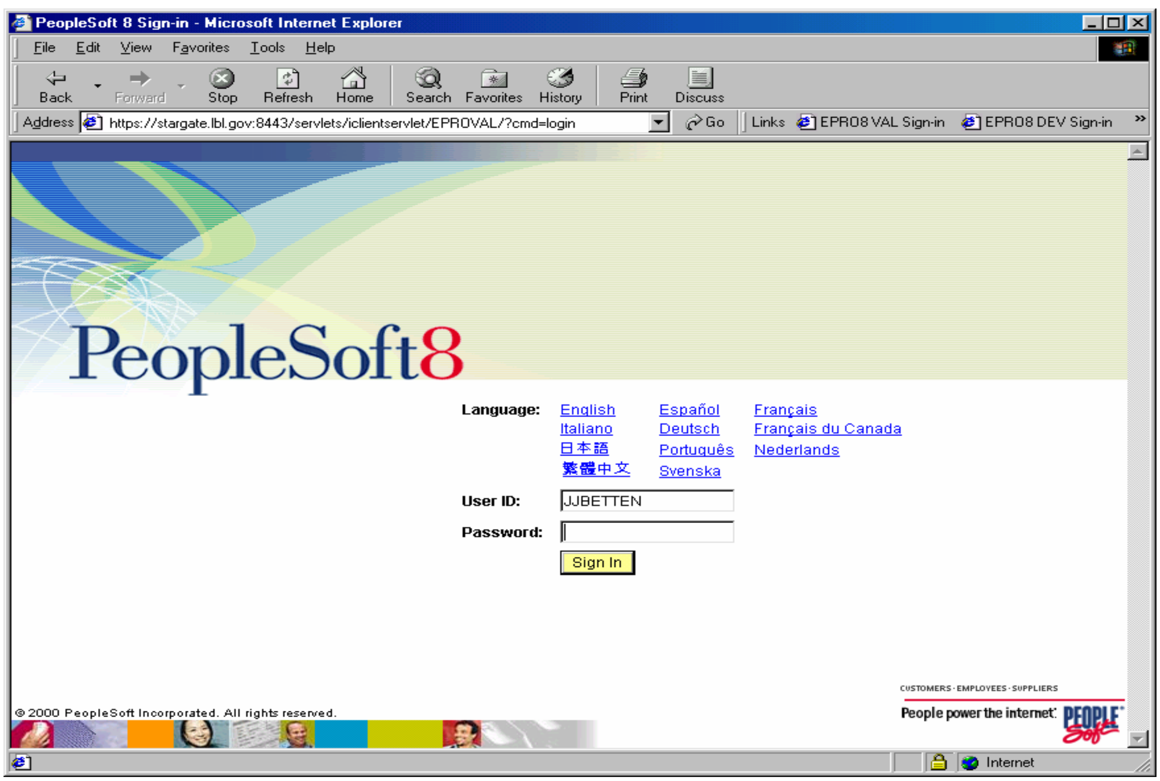
Adding Multiple Distributions

15. Added 12. multiple distribution lines will be used for Project ID's, Cost Distributions, and Ship To info.

How Do I Create a Requisition?

Step 1: Login

- Launch Internet Explorer (IE)
  - Log into eProcurement 8 via the link of **epro/eproprd** for production (or **epro/eprotrn** for the training database).
  - ***Note:*** *If your workstation is not set up with Internet Explorer contact the Help Desk (4357).*
- Enter your login name (UPPERCASE only)
- Enter your password



How Do I Create a Requisition?

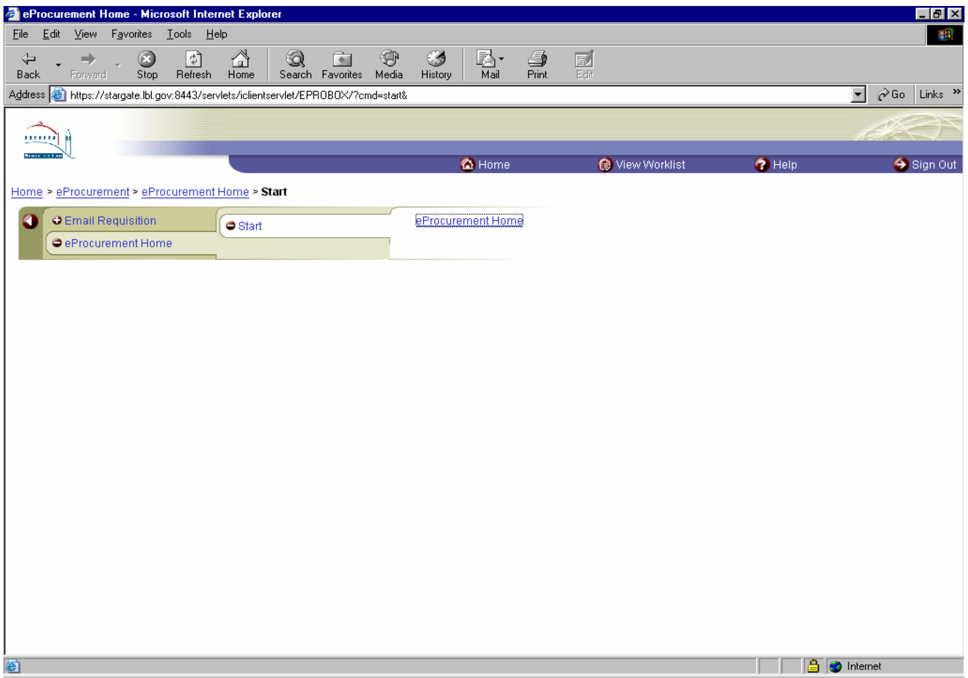
Step 2: Navigation

⇨ eProcurement

⇨ eProcurement Home

⇨ Start

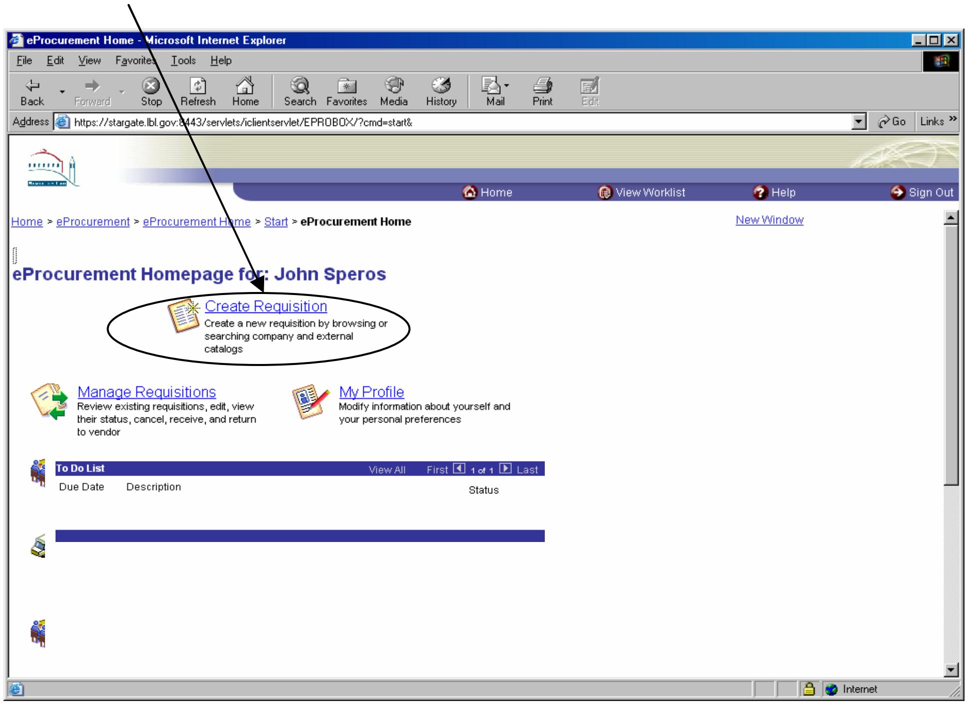
⇨ eProcurement Home



How Do I Create a Requisition?

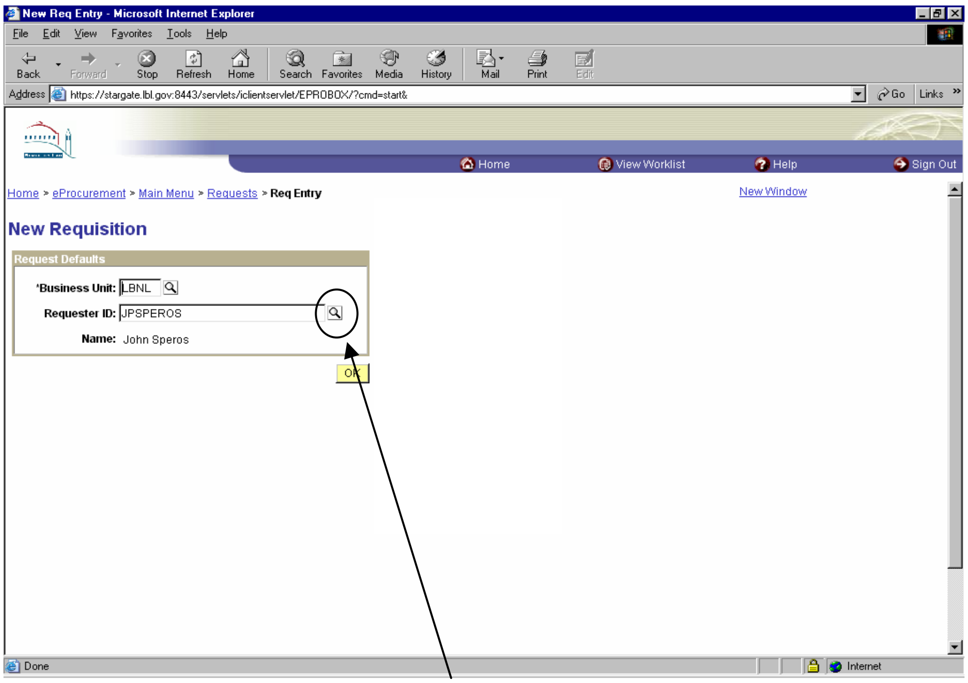
Step 3: Select Function

⇨ Click “Create Requisition”



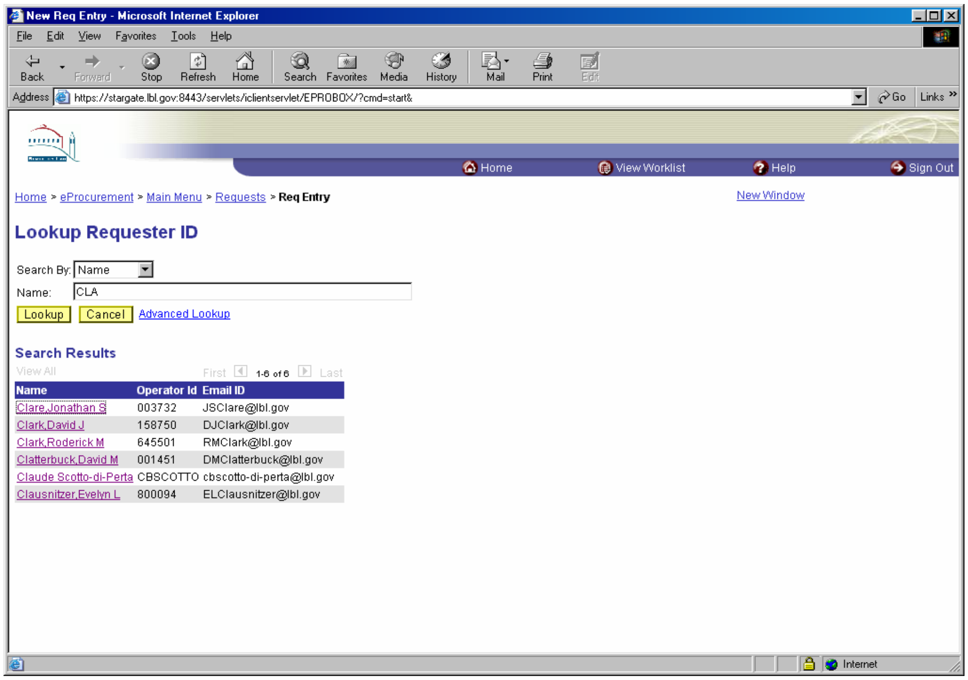
Step 4: Enter the Requester

- If **LBNL** is not defaulted in as the Business Unit then enter **LBNL**.
- Verify that the **Requester ID** is correct (from your operator defaults)
- Click on the **OK** button



- Click the **Requester ID** lookup icon to find the specific requester's name. The Lookup Requester ID panel will be displayed.

How Do I Create a Requisition?

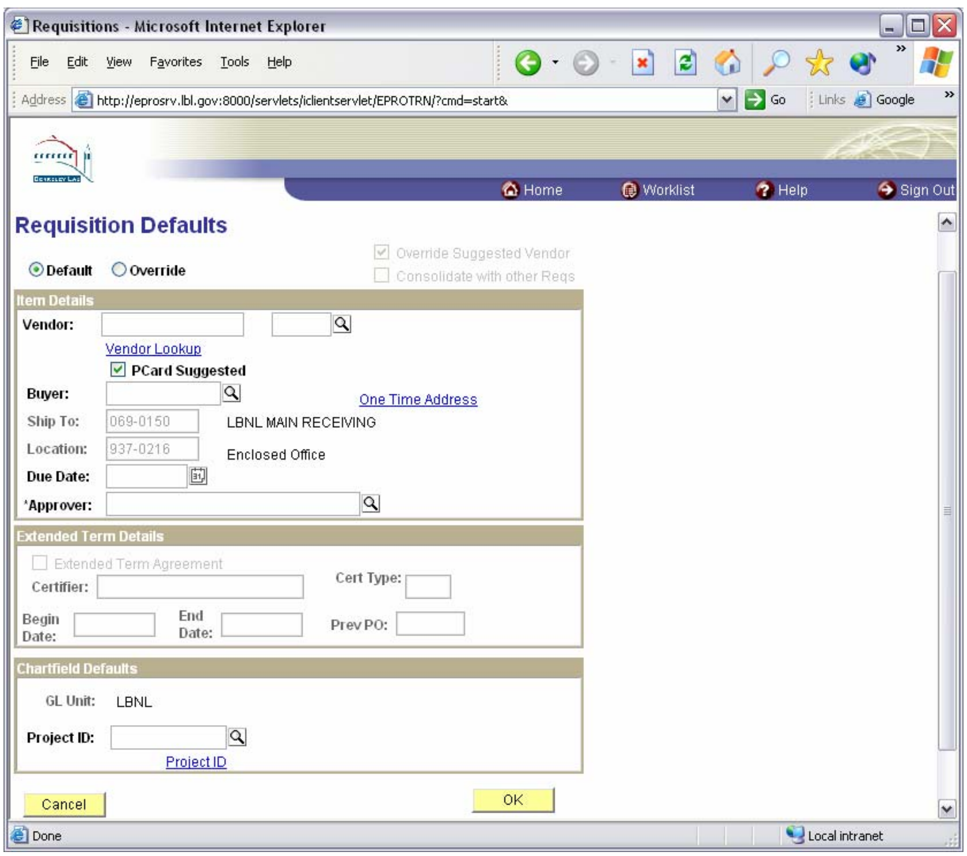


- In the **Search By** field, change the value to “Name”.
- In the **Name** box, enter the beginning of the requester’s last name and click the **Lookup** button. All requesters matching the name you entered will be returned.
- Select the requester you want by clicking on the link. The value will appear on the previous “New Requisition” page.

How Do I Create a Requisition?

Step 5: Enter the Requisition Defaults

- Click the **Vendor Lookup** link to select a vendor or leave the vendor blank and have the buyer choose one.
  - If a vendor's name is not listed, type in the vendor's Name, Phone Number, and Contact in Line 1's **Comments** section (see below).
- Leave the **PCard Suggested** box checked unless the items are over $5,000, restricted, or will be on an Extended Term (blanket) order.
- Leave the **Buyer** box blank unless you have been working with a buyer and the buyer instructed you to enter their name. You can select a buyer by clicking on the next to the buyer name, clicking the Lookup button, and clicking on the applicable buyer's name.
- Verify that the **Ship To** address & **Location** are correct. (Location is taken from the Requester defaults). If you want to change these, click the **Override** button and select the appropriate values using the icon. Laboratory locations must have 3-digit building numbers. (Do **not** uncheck the **Override Suggested Vendor** box.)
- Enter the **Due Date** when you need your items
- Enter an **Approver** from your division with enough dollar authority to approve the requisition. (See the IRIS "Authorized Signers" page.) The Approver is entered similarly to the Requester in Step 4 above.



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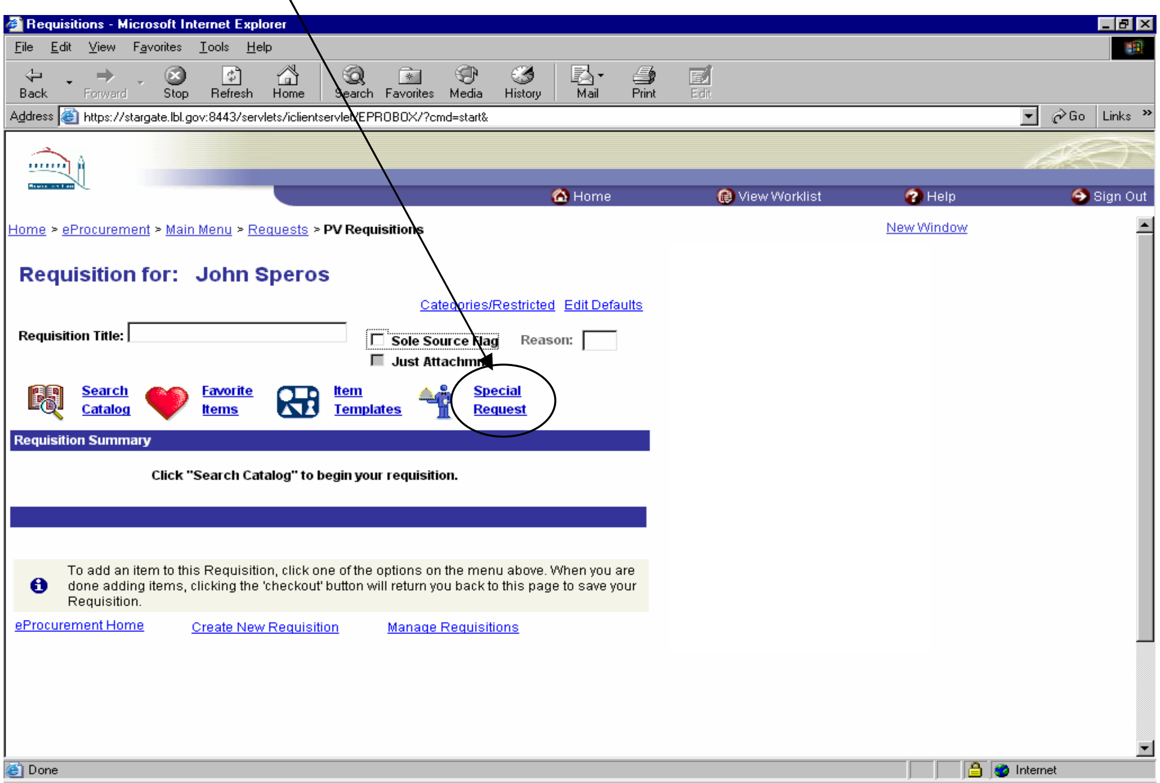
- If this requisition is for a new Extended Term Agreement (blanket order), *uncheck* the **PCard Suggested** box and *check* the **Extended Term Agreement** box. (If the requisition will be used to change an existing Extended Term agreement, enter the below information in Line 1's **Comments** box and do not enter the information on the Requisition Defaults page.)
  - Select a **Certifier** who will be responsible for approving invoices. A Certifier is entered similarly to the Requester name in Step 4 above.
  - Enter a **Begin Date** and **End Date**.
  - Enter a previous PO number in the **Prev PO** box if this replaces an existing Extended Term Agreement.
  - Select a **Cert Type** to indicate how invoices should be handled.
- Enter the default **Project ID** for the requisition.
- Click the **OK** button

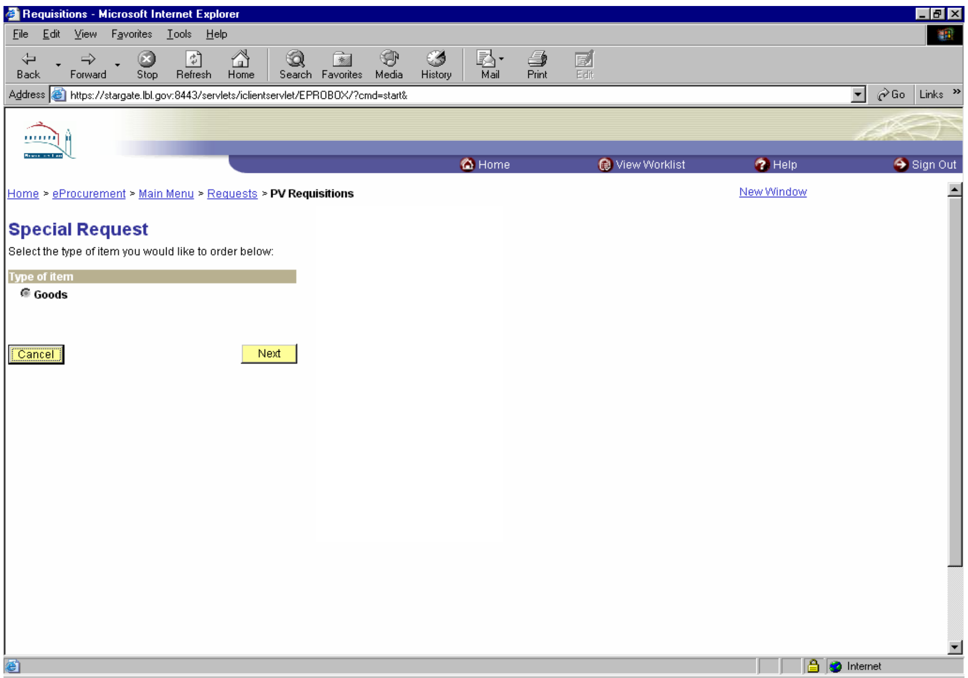
Step 6: Enter the Requisition Type

- Click on the **Special Request** link each time you want to add a new line to the requisition. Enter a requition line for each item that you expect to be indepedently received or invoiced. (We only use Special Request now.)



Enter the Special Request Type

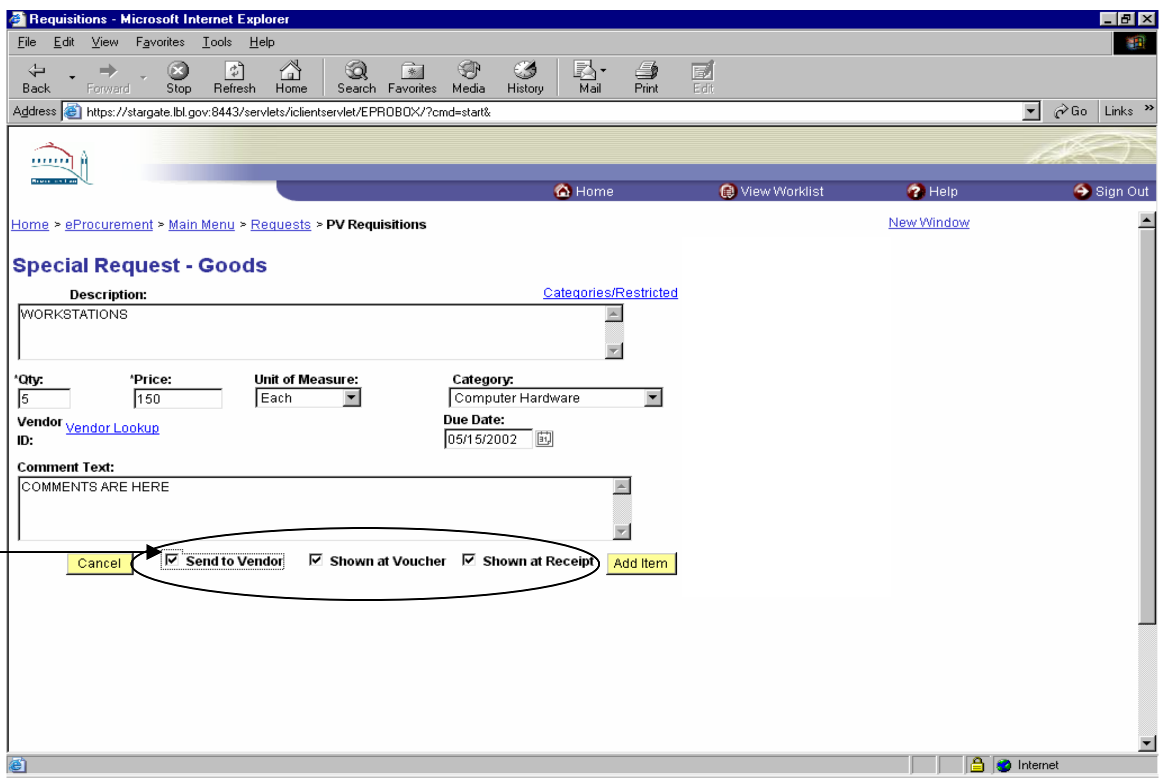
- Click the **Next** button



How Do I Create a Requisition?

Step 7: Enter the Requisition Details

- Enter a **Description** of the item or service being requested. (Do not just say “See attached quote.”) Try to use the first 40 characters to describe your requirement since only those are sent to the PCard system and are available for Receiving. The **Description** box holds 254 characters. Additional characters will be truncated. If you need more space to describe your requirement, use the **Comment Text** box.
- Enter a quantity (**Qty**) and unit price (**Price**). For Extended-Term requisitions, enter the total dollar amount for the line in **Qty** and enter a **Price** of $1.00 to enable Accounts Payable to pay multiple invoices for the line.
- Select a **Unit of Measure** (usually use “Each”).
- Select the **Category** that best applies to the item. Use the Categories/Restricted link for a description of categories and their requirements. (See Step 8 below for details on restricted categories.)
- **Due Date** will default from the defaults panel. You can change it for a particular item.
- Enter any **Comments Text** (if applicable) within this area up to 2001 characters. Use this as an overflow for the description field which is limited to 254 characters.Include the suggested vendor previously mentioned.
- As the Preparer, you can check who will be have access to the **Comment Text**.
- Click on the **Add Item** button**.**

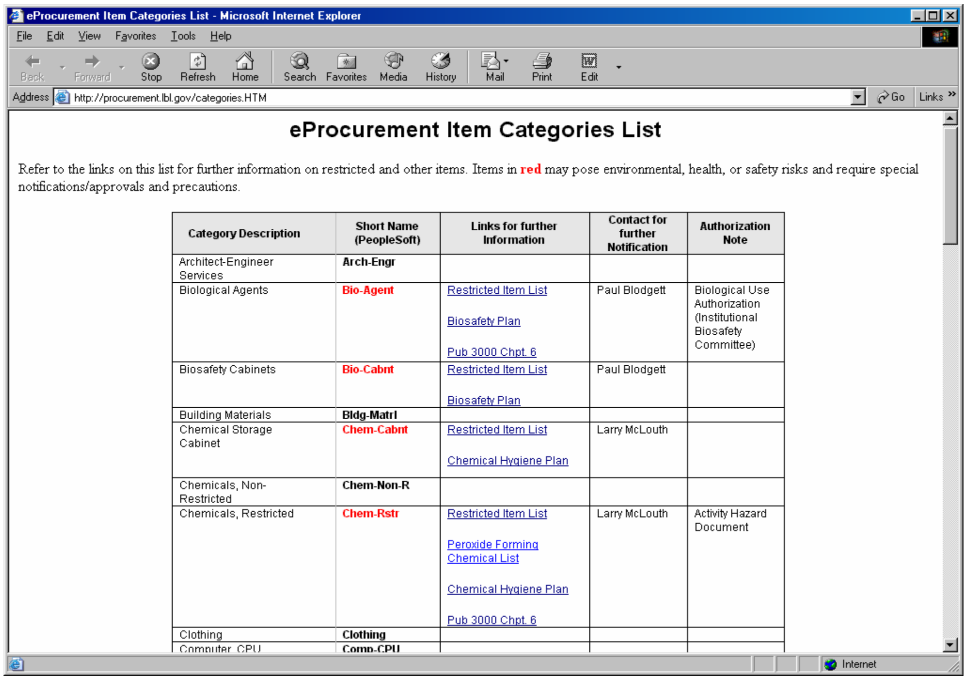


Step 8: Restricted Items Purchases

- The Laboratory is prohibited by its Prime Contract with DOE from purchasing certain items with Government funds. Other items require special internal approvals or safety measures before purchasing them. By selecting an EH&S Restricted Item category from the list, the item will be routed to EH&S for approval or an email notification. A pop-up window will warn the user when the item Category is an EH&S Restricted item.
  - LBNL maintains the *Restricted Item List* which can be viewed on the Procurement Web site at http://procurement.lbl.gov/restrict.htm.
  - The chemicals and materials on the list are either dangerous to people or harmful to the environment and are regulated by Federal, DOE, State, or LBNL.
  - These items are restricted but not prohibited from being purchased. The Laboratory needs to ensure that the proper controls and authorizations are in place before the items are purchased. This is a Line Management responsibility.
  - EH&S should be consulted before purchasing restricted items.
  - Some substances/equipment require approval before purchase.
  - The requisition should contain all contact names and phone numbers to call in any case.
  - When you submit a requisition for a Restricted Item, you are acknowledging that you have followed the rules regarding its purchase.

A link to the Categories page appears in each ePro requisition line and on the Requisition Summary page. Items on the Categories page in red may pose environmental, health, or safety risks and require special notifications/approvals and precautions. The eProcurement Categories page indicates which categories require EH&S approval and which ones require EH&S notification. The Categories page provides item Category definitions, whether or not an item is restricted, and applicable contact names (see example below).

How Do I Create a Requisition?



eProcurement Item Categories List - Microsoft Internet Explorer

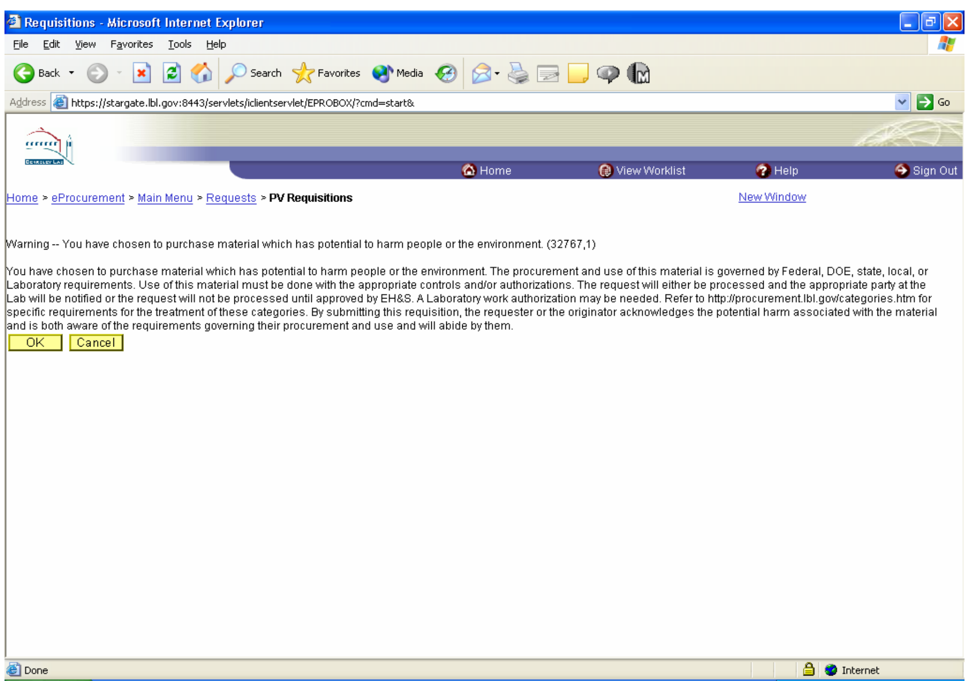
Address http://procurement.lbl.gov/categories.HTM

eProcurement Item Categories List

Refer to the links on this list for further information on restricted and other items. Items in **red** may pose environmental, health, or safety risks and require special notifications/approvals and precautions.

Category Description	Short Name (PeopleSoft)	Links for further Information	Contact for further Notification	Authorization Note
Architect-Engineer Services	Arch-Engr			
Biological Agents	Bio-Agent	Restricted Item List Biosafety Plan Pub 3000 Chpt. 6	Paul Blodgett	Biological Use Authorization (Institutional Biosafety Committee)
Biosafety Cabinets	Bio-Cabnt	Restricted Item List Biosafety Plan	Paul Blodgett	
Building Materials	Bldg-Matrl			
Chemical Storage Cabinet	Chem-Cabnt	Restricted Item List Chemical Hygiene Plan	Larry McLouth	
Chemicals, Non-Restricted	Chem-Non-R			
Chemicals, Restricted	Chem-Rstr	Restricted Item List Peroxide Forming Chemical List Chemical Hygiene Plan Pub 3000 Chpt. 6	Larry McLouth	Activity Hazard Document
Clothing	Clothing			
Computer, CPU	Comp-CPU			

When the user saves the requisition, they will receive a warning pop-up panel showing that they've selected a restricted item.



Requisitions - Microsoft Internet Explorer

Address https://stargate.lbl.gov:8443/servlets/iclientservlet/EPROBOX/?cmd=start&

Home | View Worklist | Help | Sign Out

Home > eProcurement > Main Menu > Requests > **PV Requisitions** New Window

Warning -- You have chosen to purchase material which has potential to harm people or the environment. (32767,1)

You have chosen to purchase material which has potential to harm people or the environment. The procurement and use of this material is governed by Federal, DOE, state, local, or Laboratory requirements. Use of this material must be done with the appropriate controls and/or authorizations. The request will either be processed and the appropriate party at the Lab will be notified or the request will not be processed until approved by EH&S. A Laboratory work authorization may be needed. Refer to http://procurement.lbl.gov/categories.htm for specific requirements for the treatment of these categories. By submitting this requisition, the requester or the originator acknowledges the potential harm associated with the material and is both aware of the requirements governing their procurement and use and will abide by them.

OK Cancel

The Preparer must acknowledge the receipt of this warning by clicking on the OK button. Once accepted, the requisition will be saved and a requisition number will be assigned. When the requisition is submitted, EH&S will either be notified via email or be required to approve the request before the request is sent to Procurement.

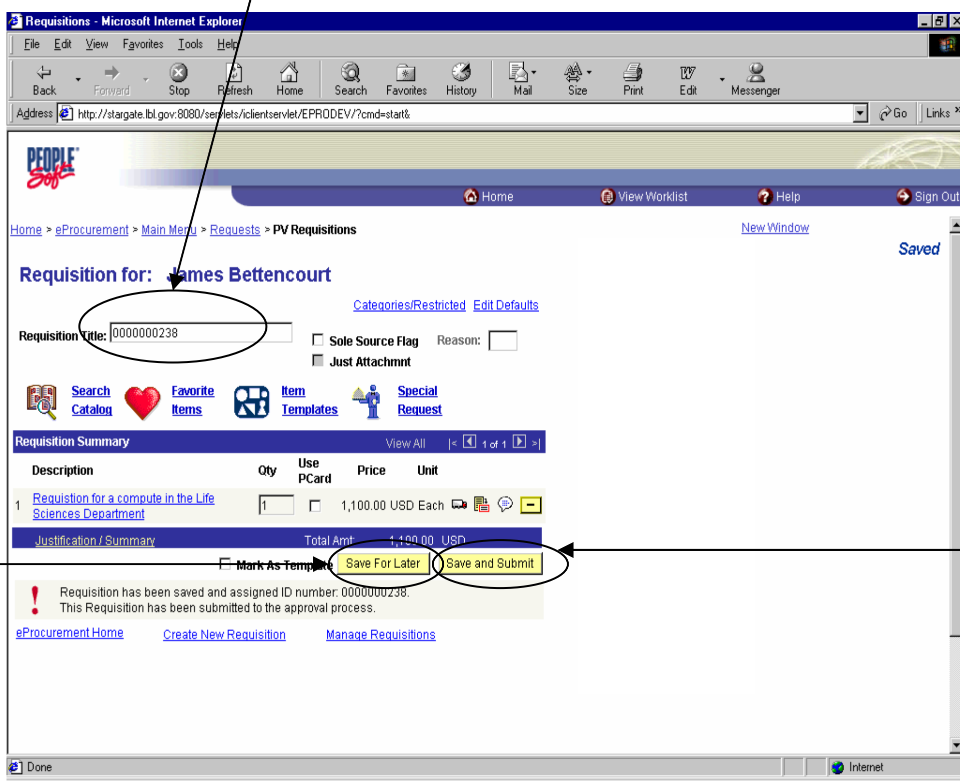
How Do I Create a Requisition?

Step 9: Save for Later or Submit Requisition

- When you finished with the requisition, you can either **Save and Submit** the requisition for approval and further processing or **Save for Later**. The **Save for Later** function allows you to save the requisition and get a requisition number You can then lookup the requisition number and edit it a future time. **Save for Later** does not send the requisition to the approver but lets you continue to work on it at a later time.

- Here is the requisition number:

Save for Later

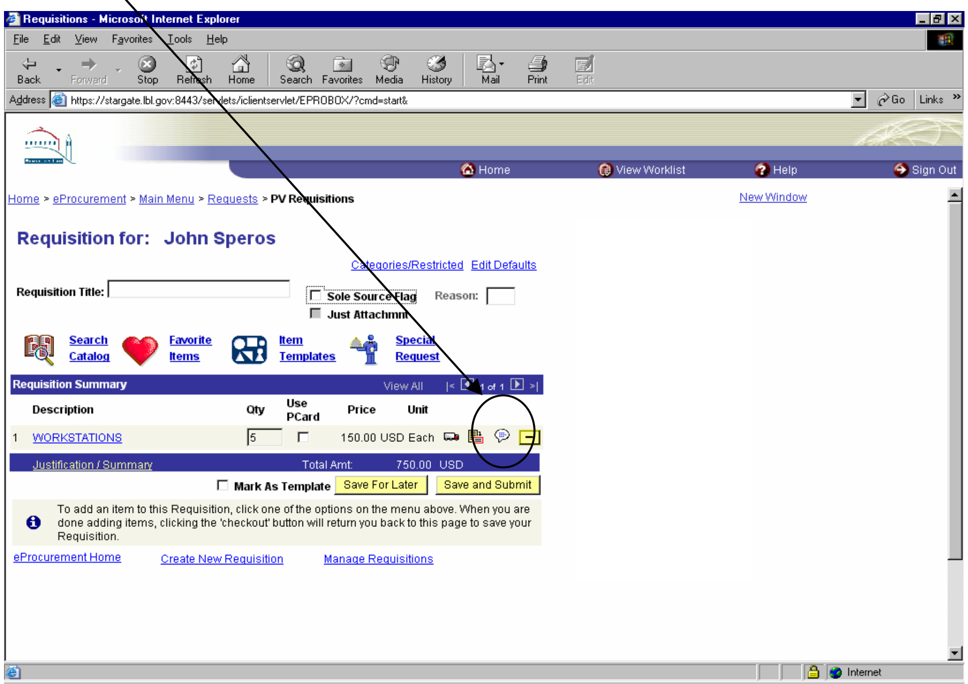


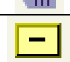
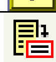
Save and Submit

How Do I Create a Requisition?

Step 9: Requisition Summary Page

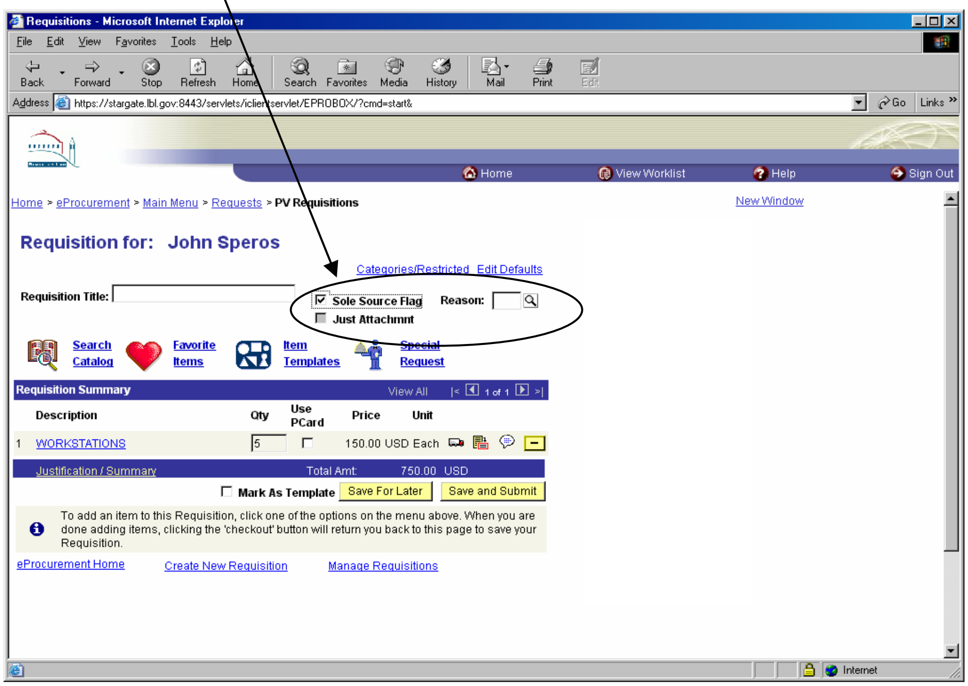
- Once you've reached this panel, you have the option of clicking the **Save and Submit** button to complete the requisition. Should there be a requirement to add file attachments you will need to click on the **Comments** icon.



	Use this Icon to edit/update the delivery schedule details and project distribution information.
	The distribution page (accessible when you click on the above truck icon) will allow you to create multiple project distributions (split the requisition among several projects).
	Adding "One-Time Addresses"
	Delete 1 Line
	Add 1 Line
	Line Detail Information for the requisition line items
	Comments Page
 Special Request	**To add an additional item to this Requisition, click the "Special Request" icon/link.**
Save and Submit	When you are done adding items, click on the **Save and Submit** button to create a requisition.

Step 10: Sole Source Items

Click the **Sole Source Flag** checkbox if you only want the requisition to be purchased from the vendor you specify. When you click this box, select a **Reason** (see below) for why it is a sole source.



These tables show when sole source information is required:

Typical Requisitions	
< 25K	Nothing is Required
25K – 100K	Check Sole Source box and select a reason.
≥ 100K	Check Sole Source box and attach Justification Form

IUT (Intra-University Transactions – UC)	
< 25K	Nothing is Required
≥ 25K	Check Sole Source box and attach Justification Form

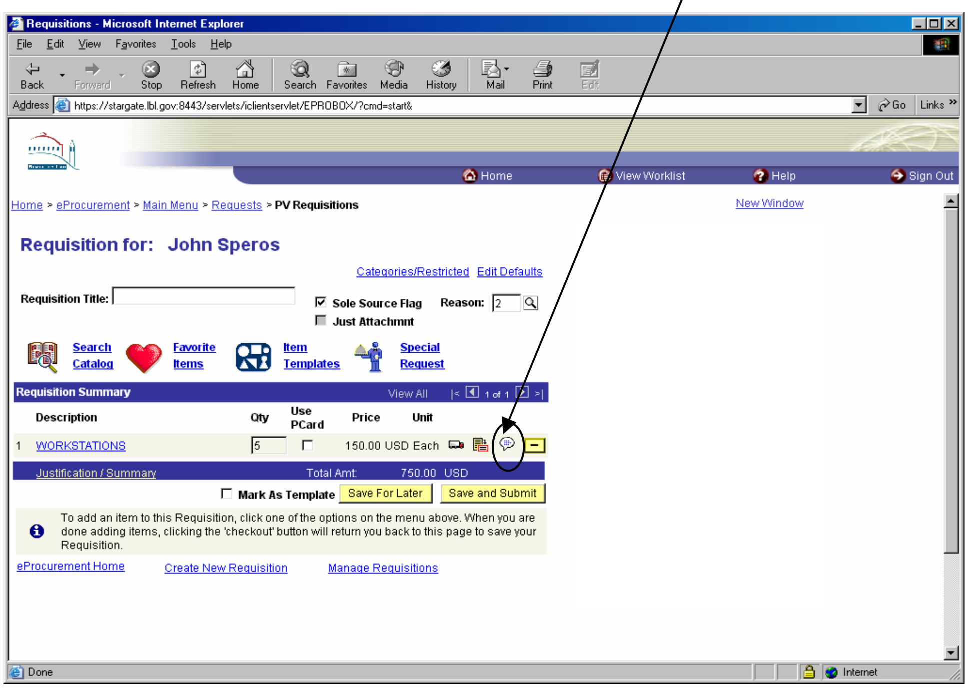
M&O (DOE Management & Operating Contractors)	
Any amount	Check Sole Source box and attach Justification Form

How Do I Create a Requisition?

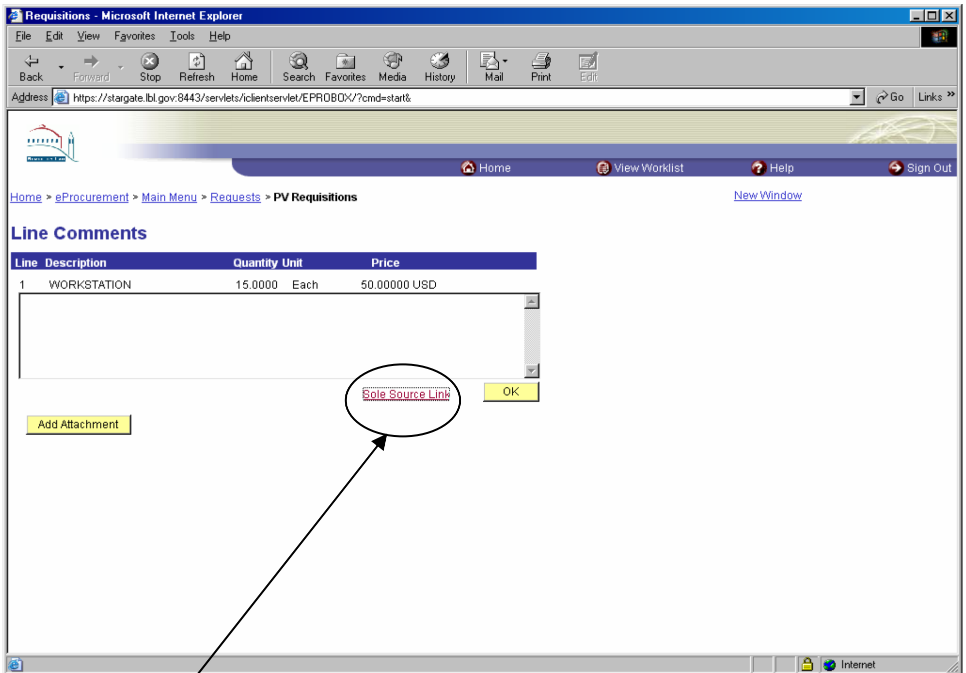
Select a reason from the Table.

1	Unique Capability
10	Other
2	Compatibility with equipment
3	Continued Develop or enhance
4	Unusual or compelling urgency
5	Industrial Mobilization
6	Authorized or req'd by statute
7	International Agreement
8	Leader in Field
9	National Security

If a Sole Source Justification Form is needed, click on the **Comments** icon to access the panel.

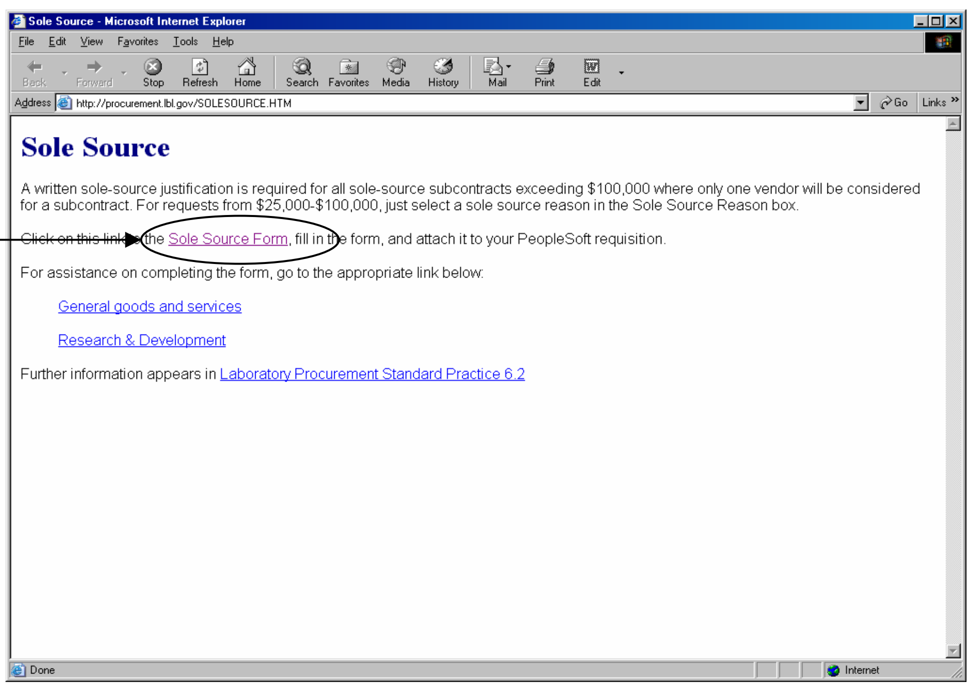


How Do I Create a Requisition?



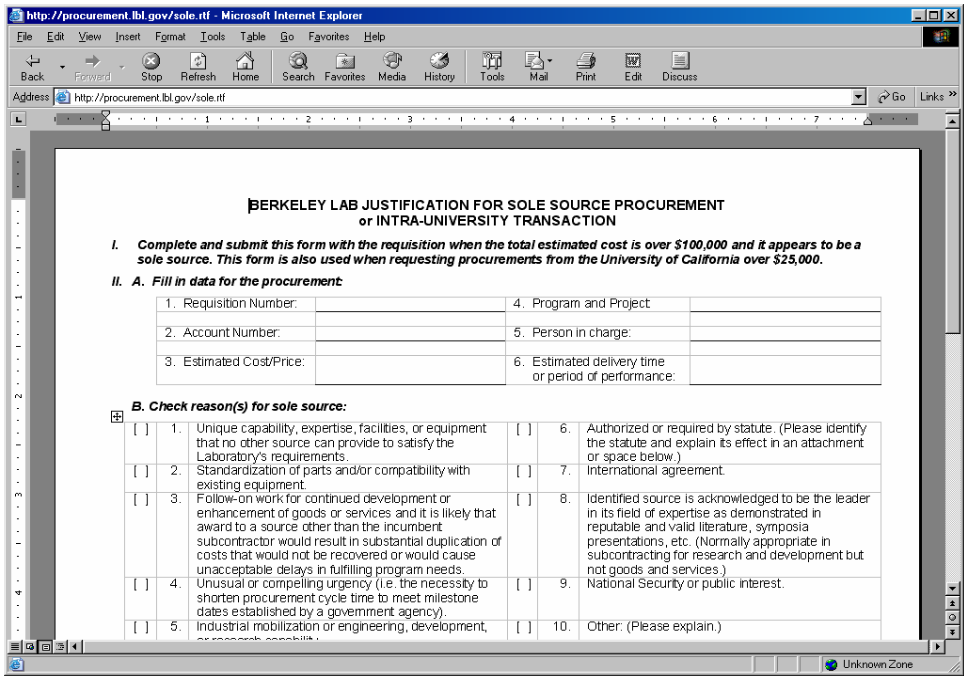
Click on the Sole Source Link to access the Sole Source Justification Form.

Sole Source Link



How Do I Create a Requisition?

Sole Source Justification Form



BERKELEY LAB JUSTIFICATION FOR SOLE SOURCE PROCUREMENT
or INTRA-UNIVERSITY TRANSACTION

I. Complete and submit this form with the requisition when the total estimated cost is over $100,000 and it appears to be a sole source. This form is also used when requesting procurements from the University of California over $25,000.

II. A. Fill in data for the procurement:

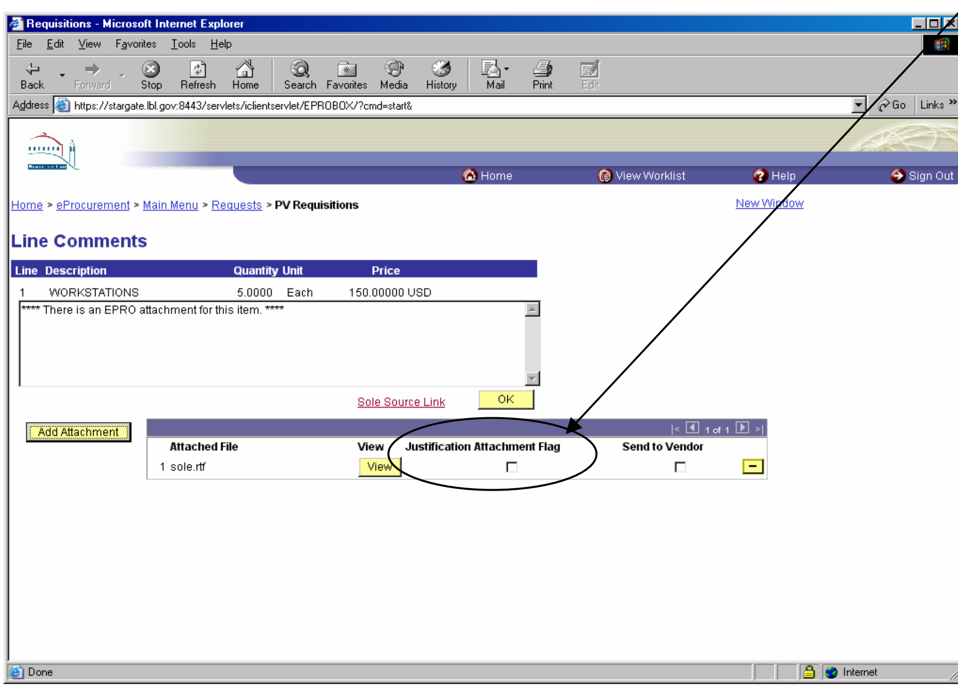
1. Requisition Number:		4. Program and Project:	
2. Account Number:		5. Person in charge:	
3. Estimated Cost/Price:		6. Estimated delivery time or period of performance:	

B. Check reason(s) for sole source:

[ ]	1.	Unique capability, expertise, facilities, or equipment that no other source can provide to satisfy the Laboratory's requirements.	[ ]	6.	Authorized or required by statute. (Please identify the statute and explain its effect in an attachment or space below.)
[ ]	2.	Standardization of parts and/or compatibility with existing equipment.	[ ]	7.	International agreement.
[ ]	3.	Follow-on work for continued development or enhancement of goods or services and it is likely that award to a source other than the incumbent subcontractor would result in substantial duplication of costs that would not be recovered or would cause unacceptable delays in fulfilling program needs.	[ ]	8.	Identified source is acknowledged to be the leader in its field of expertise as demonstrated in reputable and valid literature, symposia presentations, etc. (Normally appropriate in subcontracting for research and development but not goods and services.)
[ ]	4.	Unusual or compelling urgency (i.e. the necessity to shorten procurement cycle time to meet milestone dates established by a government agency).	[ ]	9.	National Security or public interest.
[ ]	5.	Industrial mobilization or engineering, development,	[ ]	10.	Other: (Please explain.)

Fill-in the form and save it to your computer if the form is required according to the above table. Click the **Add Attachment** icon to upload the form (or any other attachment) to ePro. Only enter requisition attachments on Line 1.

Once the attachment has been uploaded, the page will look like this. Check the **Justification Attachment Flag** box before you click **OK**.



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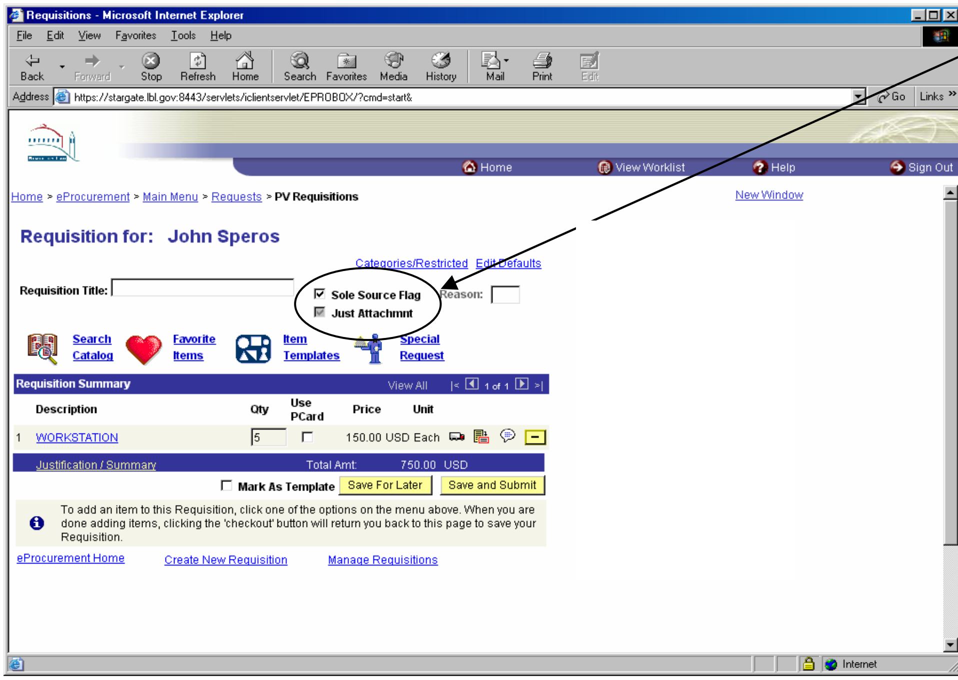
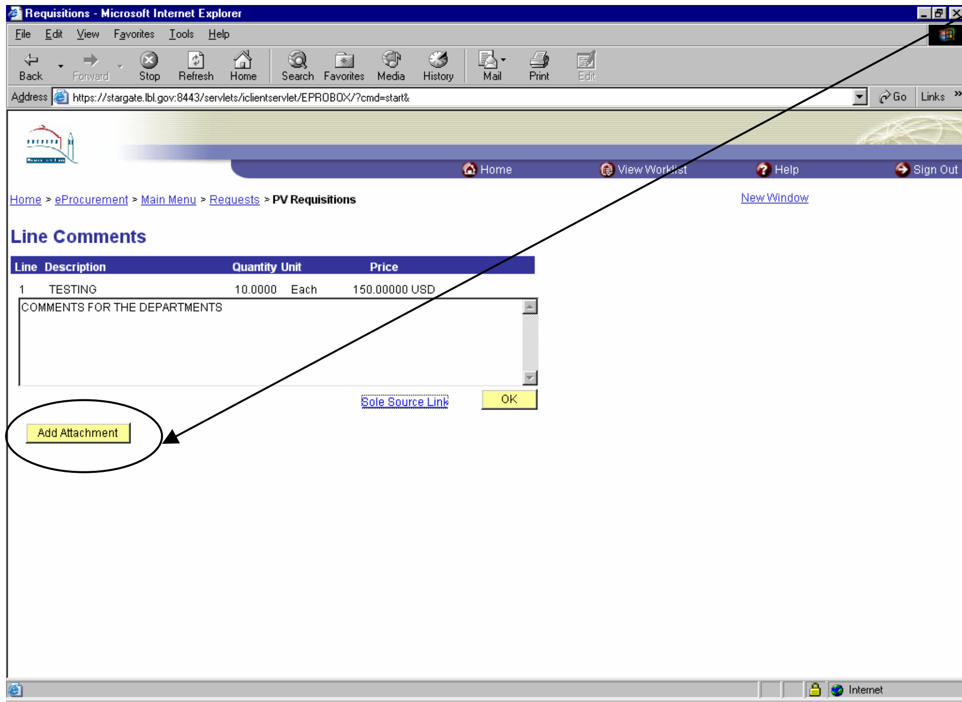
Once the file has been attached, the Requisition Summary Page will appear with a check in the **Just Attachment**



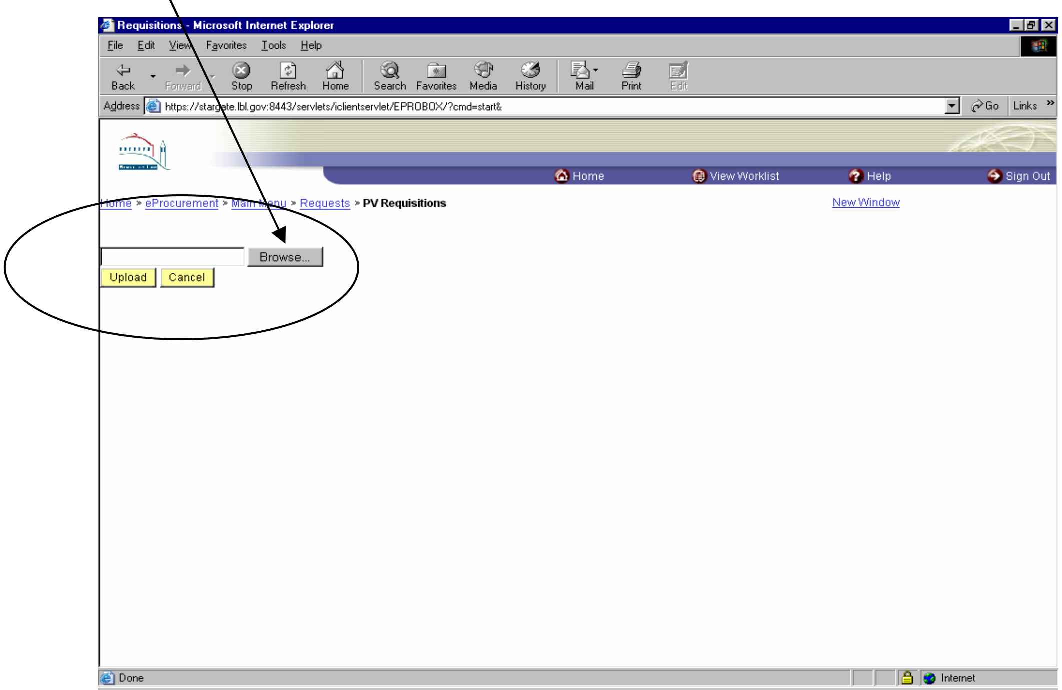
How Do I Create a Requisition?

Step 11: Adding File Attachments

- Click on the **Add Attachment** button to browse to and attach specific files to your requisition.
  - ***To add additional attachments repeat these steps.***
  - ***All attachments should be added to Line #1 only.***

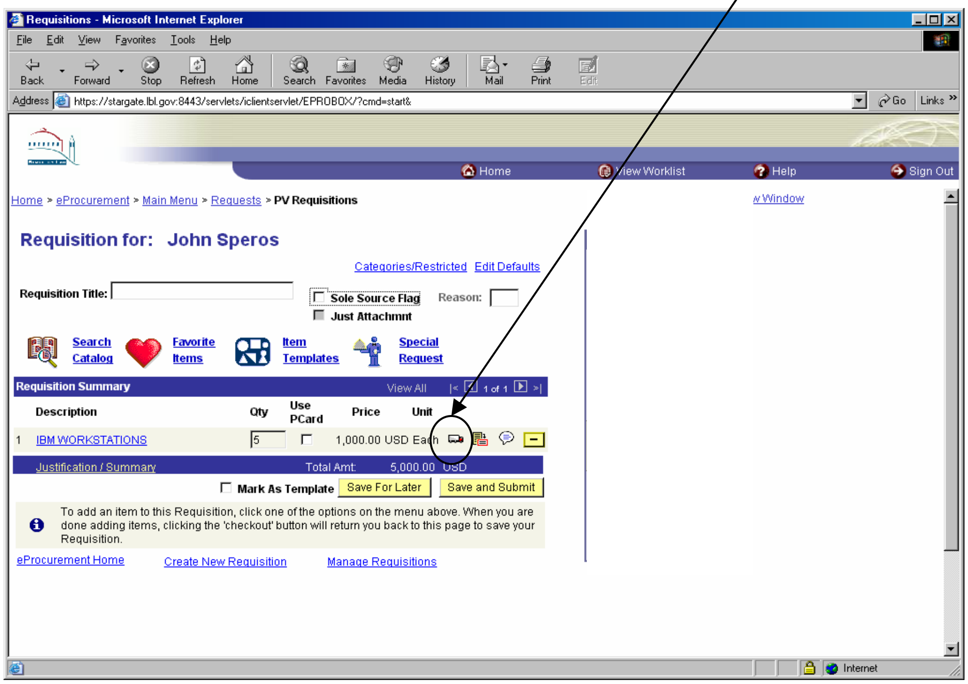


- The **Browse** button will allow you to search your computer for files to attach.

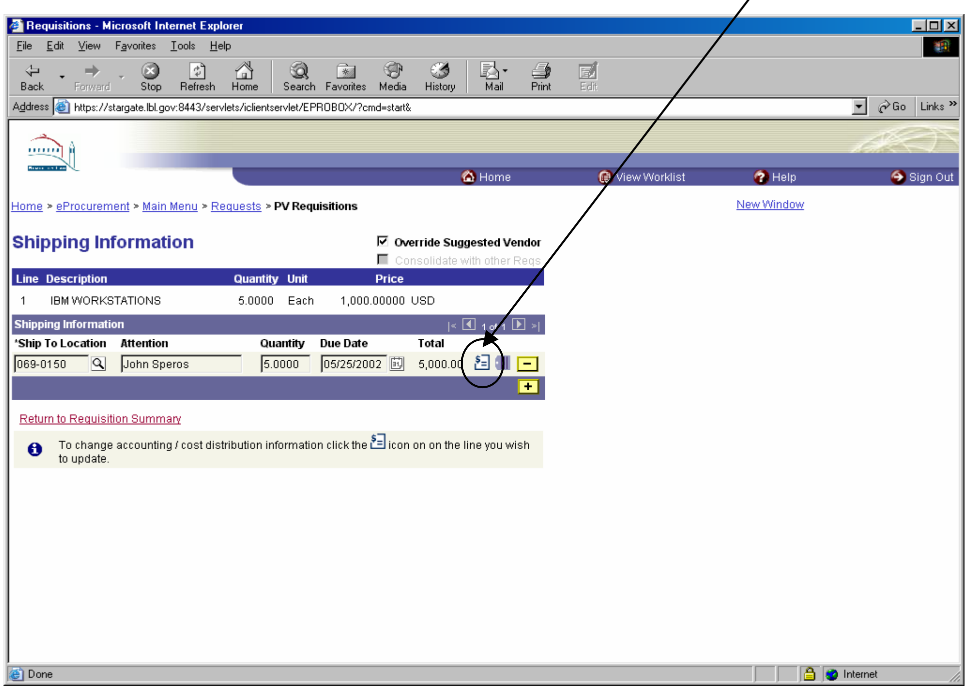


Step 12: Adding multiple line distributions (Project splits)

Note: For PCard requisitions, only the project(s) on requisition Line 1 go to the PCard order. To split a line's costs among several Project IDs, begin by clicking on the line's truck **Shipping Info** icon.



On the Shipping Information panel click on the "**Cost Distribution Info**" icon.

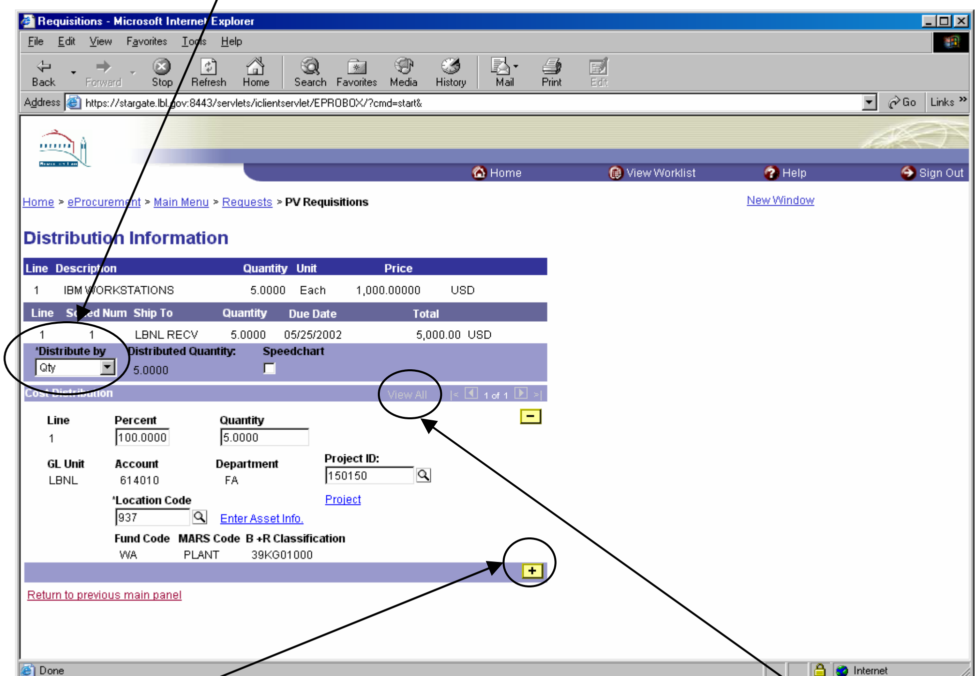


How Do I Create a Requisition?

On the “Distribution Information” page, you can add project distribution lines to the requisition (split the requisition line among several projects).

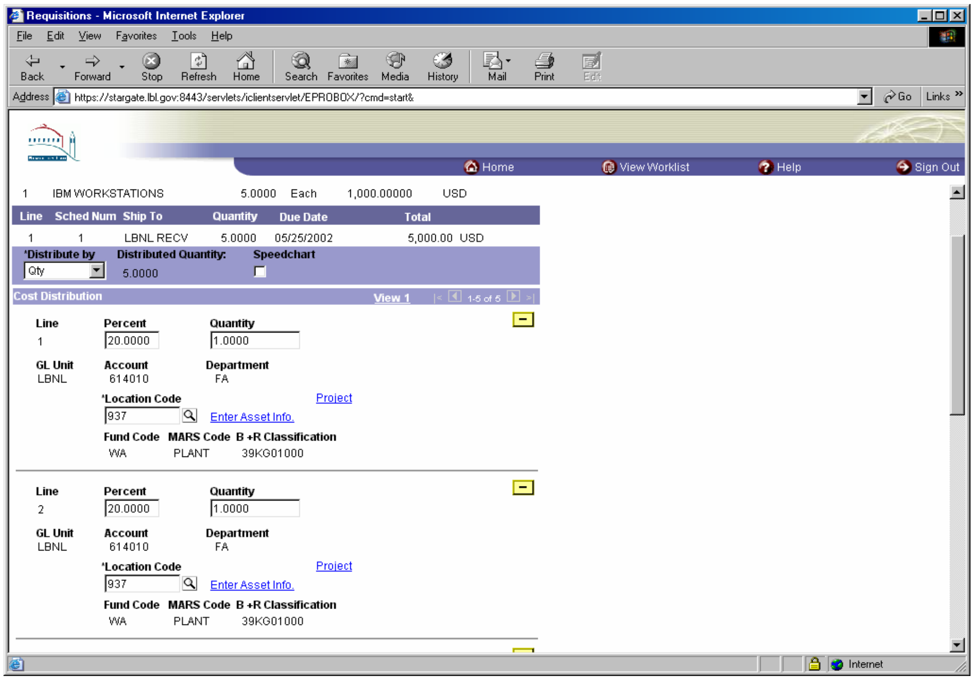
First, decide if you want to **Distribute By** quantity (**Qty**) or amount (**Amt**). For example if there is a quantity of 3, you can distribute by Qty and put 2 on one project and 1 on another. If you want to distribute by Amt, you can put $50 on one project and $60 on another. For either Qty or Amt, you can enter percentages instead of actual quantities or amounts.

If you distributed by Qty, enter the lesser **Quantity** <u>OR</u> **Percent** you want to apply to the first project.
If you distributed by Amt, enter the lesser dollar **Total** <u>OR</u> **Percent** you want to apply to the first project.



Click on the “+” button to add additional project distribution lines. Click the **View All** link to access all the project distribution lines and distribute the projects correctly.

If you need to change the project ID for the items, you do that on this page as well. Here are both distribution lines:



When you complete the project distribution, click the "Return to Previous Page" links at the bottom of each page to get back to the main Requisition Summary page. There you can click Save and Submit.

If you need to later look at your requisition's project distributions or attachments, go to the "Manage Requisitions" page, click on the requisition number, and go to its "Requisition Schedule and Distribution" link. A paperclip will appear if there is an attachment. You can click on it to view the ePro attachments.